The purpose of this training document is to provide an overview to the **1. Define Requisitions** page in the **e-Procurement** module of SMART. The **Agency Requisitioner** role uses this page.

Foundation Information: Requester *vs.* Requisitioner

SMART does **NOT** differentiate between '**Requester**' and '**Requisitioner**'. This distinction is made in this training material to explain that the '**Agency Requisitioner**' can enter requisitions for either themselves or on behalf of someone else within their Agency. Additionally, requisition approval workflow and the default values used in the requisition are based upon the '**Requester**' information entered on the '**Create Requisition – Specify Business Unit and Requester**' page.

Requester: Is the person from your agency requesting that the items be ordered. The *Requester* does **NOT** need to be a SMART user. (Requester information is loaded into SMART from SHaRP – our HR System). SMART's workflow for approval of requisitions is set up based on the *Requester* (first level of approval for a requisition is usually the Requester's supervisor).

Requisitioner: Is the person from your agency who logs in to SMART and manually creates the requisition.

FAQ's: Yes, the Requester and the Requisitioner can be the SAME user. No, you can NOT approve your own requisitions in SMART. *Please refer to your Agency's business process for assigning a Requester to a requisitio*n.

Foundation Information

It is important to know and to understand that the approval workflow for a requisition in SMART is based on the *Requester* assigned to the requisition. When the requisition is '**saved and submitted**' in to the workflow process for **approval**, the requisition is first routed to the **Requester's supervisor** for approval. Additional levels of approval may pertain to the requisition after the initial approval by the Requester's supervisor. Please refer to your Agency regarding the number of levels of approval within your Agency for your Agency's requisitions.

The '**Line Defaults**' section of the '**1. Define Requisition**' page is used to enter information that pertains to **ALL LINES   (items and/or services)   ON THIS REQUISITION**.

Edit Requisition

	1. Define Requisition		2. Add Items and Services		3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: `17300` Department of Administration

Requester: `DA00SLF` Silvia L Fairbank   *Currency: `USD`

Requisition Name: `UPS`   Priority: `Medium`

▼ Line Defaults

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Vendor: [ ]   Vendor Location: [ ]

Buyer: [ ]   Category: [ ]   Unit of Measure: [ ]

Shipping Defaults

Ship To: `173S02`   ☒ Modify Shipping Address

Due Date: [ ]   Attention: [ ]

Accounting Defaults

Chartfields1	Details	Asset Information	(>>)

Location	GL Unit	Entry Event	Dept	Fund	Bud Unit	Program	Account	PC Bus Unit	Project	Activity	Source Type	Category	Subcategory
BA17300	17300		1730406	6165	9800	97741	539700						

`Continue`

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1. Define Requisition page – Header Section

Business Unit: Displays the Agency's five digit **Business Unit** number (three digit Agency number with two zeroes on the end). The name of the Agency is displayed to the right of the Business Unit field.

Requester: The Requester is the person who is *requesting that the items/services be ordered for the Agency*. The Requester's **SMART User ID** is entered into the **Requester** field. The full name of the Requester is displayed to the right of the Requester field.

Requisition Name: The **Requisition Name** field is used to enter an easily recognizable description for the requisition. *For example:* Your Agency may choose to enter the Vendor's name, the item(s)/service(s) being ordered, an internal Agency reference number, or even a specific event. Please refer to your Agency's business process regarding what data to enter in the Requisition Name field.

Note: If you leave the Requisition Name field blank (empty), SMART will automatically populate the ten digit Requisition ID number in to this field. (This will not be helpful in locating this specific requisition again in the future using the 'Manage Requisitions' page).

Currency The State of Kansas is not using this functionality in SMART – Default value is **USD** (US Dollars).

Priority: The State of Kansas default value for this field is '**Medium**'. The Priority field is used to set a priority level of the requisition. SMART does not systematically prioritize the submitted requisitions. However, your agency may choose to use this field to help prioritize work or need.

Note: 'It is important to know and to understand that *the requisition workflow process will be re-triggered* if the requisition has entered the workflow process and then the Priority is changed.

1. Define Requisition page – Line Defaults Section

Foundation Information

The '**Line Defaults Section**' is designed to help simplify data entry when creating a **multi-line requisition**. Values entered in this section will be applied to **all requisition lines** being created using the next two requisition pages: The '2.Add Items and Services' page and the '3.Review and Submit' page.

Edit Requisition

| | 1. Define Requisition | | 2. Add Items and Services | | 3. Review and Submit |

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: 17300   Department of Administration
Requester: DA00SLF   Silvia L Fairbank   *Currency: USD
Requisition Name: UPS   Priority: Medium

▼ Line Defaults

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Vendor: [ ]   Vendor Location: [ ]
Buyer: [ ]   Category: [ ]   Unit of Measure: [ ]

Shipping Defaults

Ship To: 173S02   Modify Shipping Address
Due Date: [ ]   Attention: [ ]

Accounting Defaults

| Chartfields1 | Details | Asset Information | |

Location	GL Unit	Entry Event	Dept	Fund	Bud Unit	Program	Account	PC Bus Unit	Project	Activity	Source Type	Category	Subcategory
BA1730C	17300		173040E	6165	9800	97741	539700						

[Continue]

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1. Define Requisition page – Line Defaults Section (Continued…)

LookUp Button: If you do not know what value to enter into a specific field, use the **Lookup button** 🔍 (Magnifying glass icon) to view a list of available options for that field. Available options may be Agency specific. Please refer to your Agency's business process about what values to enter into fields.

Vendor: If **_ALL_ _lines on the requisition_** (i.e. all items and/or services) are going to be ordered from the **_SAME vendor_**, then you may use this field to enter in the ten digit **Vendor ID** number. The ten digit Vendor ID number is sourced from the Vendor file which is stored in the Vendor section within SMART. (You must be assigned the **_Vendor Viewer_** role in order to be able to view all the Vendor information in SMART).

Buyer: If **ALL** lines on the requisition (i.e. all items and/or services) are going to be assigned to the **SAME Kansas Buyer** within your Agency, then you may use this field to enter the Kansas Buyer's **SMART User ID**.

📘 **Note:** **_If requisition lines contain different Buyer ID's, SMART will not know which Buyer to use when creating the Purchase Order and will assign the 'BYRDFLT' default Buyer ID to all lines!_**

Vendor Location: It sounds as though this field would contain a physical street address for the vendor, right? Wrong. In the Vendor file in SMART, a **Vendor Location** is a **payment method** – in other words, which type of payment method you will use to pay the vendor for the items/services you are purchasing. *For example:* A paper check (SYSTEM CHECK), or an ACH (Direct Deposit into a Vendor's Bank Account).

To complicate the issue, a vendor may have **multiple payment methods** in their Vendor file. In SMART, the vendor payment methods are identified using Vendor Location numbers. Each payment method is assigned it's own Vendor Location number such as 001, 002, 003, and so on.

If **ALL** lines on the requisition (i.e. all items and/or services) are going to use the **SAME Vendor Location** (Payment Method), then you may use this field to enter the Vendor Location Code for the desired payment method. *If requisition lines contain different Vendor Location numbers, they will source to different PO's in SMART!*

Category: The **Category** field defines what type of item/service is being purchased. Each requisition line (for item/s or service/s) must be assigned a Category code. Category codes allow the State of Kansas to determine the types and amounts of commodities being purchased and used by the State of Kansas agencies, (and this in turn helps determine purchasing protocols, contracts, payment prices, supplier negotiations, bids, etc).

Edit Requisition

	1. Define Requisition		2. Add Items and Services		3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: 17300   Department of Administration

Requester: DA00SLF   Silvia L Fairbank   *Currency: USD

Requisition Name: UPS   Priority: Medium

▼ Line Defaults

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Vendor: [ ]   Vendor Location: [ ]

Buyer: [ ]   Category: [ ]   Unit of Measure: [ ]

Shipping Defaults

Ship To: 173S02   📧 Modify Shipping Address

Due Date: [ ]   Attention: [ ]

Accounting Defaults

| Chartfields1 | Details | Asset Information | |

Location	GL Unit	Entry Event	Dept	Fund	Bud Unit	Program	Account	PC Bus Unit	Project	Activity	Source Type	Category	Subcategory
BA17300	17300		173040E	6165	9800	97741	539700						

Continue

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1. Define Requisition page – Line Defaults Section (Continued…)

Category: It is important to ensure that you are selecting the correct Category code for each purchase that you make. Use the **LookUp** button to view the list of available Category Codes. The State of Kansas has provided a Category Code Excel spreadsheet to make searching for available Category Codes easier. The link to the Excel spreadsheet is provided on the **LookUp Category Code** page (accessed by clicking the LookUp button). A .PDF version of this file also has a link provided on this page for your use.

If **ALL** lines on the requisition (i.e. all items and/or services) are going to use the **SAME Category Code**, then you may use this field to enter the appropriate Category code.

📘**Note:** Behind the scenes in SMART, Category Codes are tied to Account ChartField values. Selecting the correct Category code prompts SMART to populate the appropriate Account ChartField value at the requisition line level. Please refer to your Agency for specific funding/ChartField questions.
*For more information, please refer to the **Creating Requisitions - Training Guide** on the SMART website.*

Unit of Measure: [Also known throughout SMART as '**UOM**']. The **Unit of Measure** is a defining value which represents the unit of measure in which you are purchasing the item(s)/service(s) from the vendor.
For example: EA = Each, DOZ = Dozen, BG = Bag. Click the **LookUp** button to view the full list of UOM's from which to choose.

If **ALL** lines on the requisition (i.e. all items and/or services) are going to use the **SAME Unit of Measure**, then you may use this field to enter the appropriate Unit of Measure value.

1. Define Requisition page – Shipping Defaults Section

Ship To: The **Ship To** field is used to enter the Ship To **Location Code**. Agencies may have one or more Ship To locations. When a ***Requester*** is set up in SMART, their profile is set up with a default 'Ship To' Location Code (for their Agency's location).

Each time the Requester is selected on a requisition, their default Location code automatically populates into the 'Ship To' field. This value may be manually changed by clicking on the **LookUp** button and selecting an alternate Location Code from the list for your agency.

📘 **Note:** You can NOT view the physical street address using this field or its LookUp button. Please refer to the **Modify Shipping Address Link and Icon (Envelope icon)** within this training document for additional information.

Edit Requisition

1. Define Requisition		2. Add Items and Services		3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: 17300   Department of Administration

Requester: DA00SLF   Silvia L Fairbank   ***Currency:** USD

Requisition Name: UPS   **Priority:** Medium

▼ Line Defaults

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Vendor: **Vendor Location:**

Buyer: **Category:**   **Unit of Measure:**

Shipping Defaults

Ship To: 173S02   ✉ Modify Shipping Address

Due Date: **Attention:**

Accounting Defaults

Chartfields1 | **Details** | **Asset Information** |

Location	GL Unit	Entry Event	Dept	Fund	Bud Unit	Program	Account	PC Bus Unit	Project	Activity	Source Type	Category	Subcategory
BA17300	17300		173040E	6165	9800	97741	539700						

Continue

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1. Define Requisition page – Shipping Defaults Section (Continued...)

Ship To: If **ALL** lines on the requisition (i.e. all items and/or services) are being delivered to the **SAME Ship To** address, then you may use this field to enter the appropriate Ship To Location Code.

Due Date: If **ALL** lines on the requisition are due on the **SAME Due Date** from the vendor, then use this field to manually enter the Due Date, OR, click the *Calendar Page* icon (to the right of the field) to select the appropriate date from the calendar.

◆ **Note:** SMART will allow you to select a due date that is more that 90 days in the future. If the Due Date is more than 30 days in the future a pop-up message is received, and the Requisitioner can simply select the **OK** button and proceed, SMART does not stop the requisition entry.

Modify Shipping Address Link and Icon (Envelope icon): The *envelope icon* is located to the left of the **Modify Shipping Address link**. Clicking either the 'Modify Shipping Address' link OR clicking the envelope icon opens the **Shipping Address** page.

When a *Requester* is set up in SMART, their profile is set up with a default physical street address (for their Agency's 'Ship To' location). Each time the Requester is selected on a requisition, their default Shipping Address automatically populates into the Shipping Address page based on the 'Ship To' Location code default/selected. If desired, this physical street address may be manually changed by clicking **Modify Shipping Address link OR** by clicking on the **envelope icon** to access the **Shipping Address** page.

If **ALL** lines on the requisition (i.e. all items and/or services) are being delivered to the **SAME Shipping Address**, then you may use the **Shipping Address** page to enter the appropriate physical street address for delivery.

Attention: This field will default with the **Requester's** name. There is nothing gained by changing the 'Attention' value; so it is recommended to leave the default value. The 'Attention' value will not flow forward to the Purchase Order and entering a different name in the 'Attention' field will not change workflow, the workflow is based upon the Requester ID entered on the 'Specify Business Unit and Requester' page.

Edit Requisition

☒ **1. Define Requisition**	▣ 2. Add Items and Services	▣ 3. Review and Submit	

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: 17300   Department of Administration

Requester: DA00SLF   Silvia L Fairbank   ***Currency:** USD

Requisition Name: UPS   **Priority:** Medium ▾

▾ Line Defaults

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Vendor: [ ] 🔍   **Vendor Location:** [ ] 🔍

Buyer: [ ] 🔍   **Category:** [ ] 🔍   **Unit of Measure:** [ ] 🔍

Shipping Defaults

Ship To: 173S02 🔍   🖃 Modify Shipping Address

Due Date: [ ] 🗓   **Attention:** [ ]

Accounting Defaults

| Chartfields1 | Details | Asset Information | ▥▶ |

Location	GL Unit	Entry Event	Dept	Fund	Bud Unit	Program	Account	PC Bus Unit	Project	Activity	Source Type	Category	Subcategory
BA17300🔍	17300 🔍	🔍	1730405🔍	6165 🔍	9800 🔍	97741 🔍	539700 🔍	🔍	🔍	🔍	🔍	🔍	🔍

Continue

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1. Define Requisition page – Accounting Defaults Section – Chartfields1 Tab

The default information which appears in the **Chartfields1 Tab** is based on the *Requester's default profile information*. When a *Requester* is set up in SMART, their profile is set up including default funding (Chartfield) information.

The default funding values can NOT be overridden from this page, there is a way to override the default values for multiple requisition lines using the '**Modify Line/ Shipping / Accounting' button** on the '**3. Review and Submit**' page.

This page can be used to populate any of the non-defaulted ChartField values (blank Chartfield fields) and have the non-defaulted ChartField values applied to all requisition lines. If **ALL** lines on the requisition (i.e. all items and/or services) are using the **SAME funding information**, you may enter that specific funding information here. Please refer to your agency for specific questions pertaining to default funding and Chartfield information.

Location: The **Location** field contains the Location Code for your Agency's Billing Address. If you wish to change the Bill To address for your Agency (i.e. The address to which the vendor mails your invoices), then click the **LookUp** button to select an alternate Billing Location Code.
🔷**Note:** You can NOT view the physical Bill To address on this LookUp screen.

GL Unit: The GL Unit (General Ledger) field contains your Agency's five digit Business Unit number.

Entry Event: The State of Kansas is not using this functionality. *Please do NOT use this field.*

Mandatory ChartField Values (*required by the State of Kansas on ALL SMART Transactions*)

Dept: The Dept (Department) field is used to enter the appropriate ten digit Department ID number.

Fund: The Fund field is used to enter the desired four digit Agency Fund number.

Bud Unit: The Bud Unit (Budget Unit) field is used to enter the correct four digit Budget Unit number.

Program: The Program field is used to enter the appropriate five digit Agency Program number.

Account: The Account field is used to enter the correct six digit Account Code number.
(On a requisition, the Account Code number should *ALWAYS* begin with a '5', indicating an expense/cost for your Agency's budget).

Edit Requisition

1. Define Requisition	2. Add Items and Services	3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: 17300 Department of Administration

Requester: DA00SLF Silvia L Fairbank ***Currency:** USD

Requisition Name: UPS **Priority:** Medium ▾

▾ Line Defaults

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Vendor: 🔍 **Vendor Location:** 🔍

Buyer: 🔍 **Category:** 🔍 **Unit of Measure:** 🔍

Shipping Defaults

Ship To: 173S02 🔍 📧 Modify Shipping Address

Due Date: 📅 **Attention:**

Accounting Defaults

Chartfields1	Details	Asset Information	

Location	GL Unit	Entry Event	Dept	Fund	Bud Unit	Program	Account	PC Bus Unit	Project	Activity	Source Type	Category	Subcategory
BA17300🔍	17300 🔍	🔍	1730405🔍	6165 🔍	9800 🔍	97741 🔍	539700 🔍	🔍	🔍	🔍	🔍	🔍	🔍

Continue

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1. Define Requisition page – Accounting Defaults Section – Chartfields1 Tab (Continued…)

The remaining Chartfields in the funding line may, or may not, be used by your agency. Please refer to your agency for Chartfield specific information.

1. Define Requisition page – Accounting Defaults Section – Details Tab

The State of Kansas is not using this functionality. ***Please do not use the Details Tab.***

1. Define Requisition page – Accounting Defaults Section – Asset Information Tab

Populating the Asset Management **Business Unit** and **Profile ID** fields on the '**1. Define Requisition**' page is applicable if **ALL** the Requisition lines are for the **SAME TYPE OF ASSET** (***For example:*** The purchase of 5 trucks).

If the assets have **differing Profile ID's** then you should enter the Asset Management Business Unit and Profile ID on each individual Requisition line on the '3. Review and Submit' page.

🔷**Note:** Please refer to the **Asset Management - Training Guide:** ***"Asset Management—The Basics"*** for additional information on Profile ID's.

Continue button: The Continue button is located at the bottom left corner of the '1. Define Requisition' page. Clicking the **Continue button** advances the user to the next requisition page: The '***2. Add Items and Services'*** page. Alternatively, the user may click the '***2. Add Items and Services'*** page title to advance to this page of the requisition.